Updated Jan 2022

# Manager's Induction Guide

## Bringing on board new staff effectively

British Red Cross

The power of kindness

# Induction timelines

## Our People

- Induction toolkit and mandatory training e-learning
- Welcome to the British Red Cross e-Learning
- Welcome Day
- Service Induction*
- Probation Review
- Continual development

*within week 1-2* · *within 1 month* · *within 2 months* · *over 6 months* · *at 6 months* · *ongoing*

## Managers (New to BRC)

- Induction toolkit and mandatory training e-learning
- Welcome to the British Red Cross e-Learning
- Welcome Day
- Managing well at BRC (staff or volunteers)
- Performance Management at BRC
- Appraisals
- Recruitment & Selection
- Service Induction*
- Probation Review
- Continual development

*within week 1-2* · *within 1 month* · *within 2 months* · *(management induction to be completed within 3 months)* · *at 6 months* · *ongoing*

## Managers (New to management roles)

- Managing well at BRC (staff or volunteers)
- Performance Management at BRC
- Appraisals
- Recruitment & Selection
- Continual development

*(management induction to be completed within 3 months)* · *ongoing*

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* Time and activities vary by Directorate/Service

# Congratulations on your new recruit!

You have invested time and resource in finding the right individual to join your team - now the most important part of the process begins!

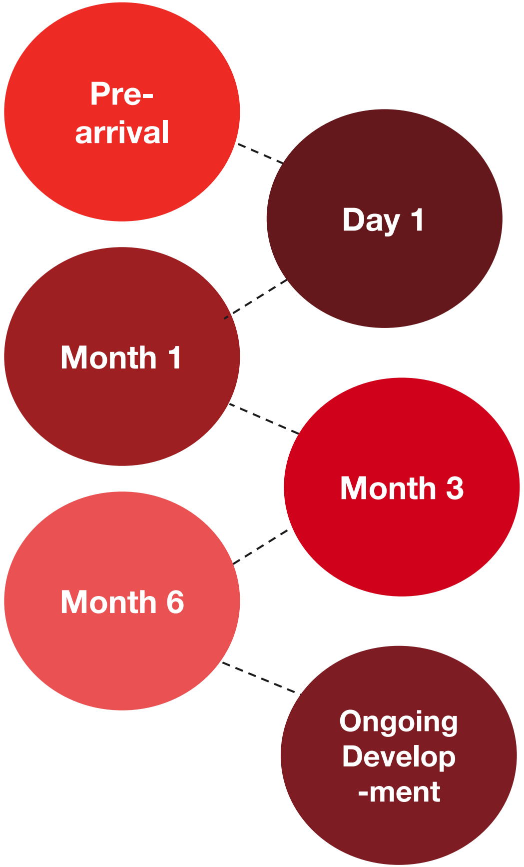
Research shows that first impressions and experiences with a new organisation can greatly influence a new starter's success and engagement; so, it is important to give their induction your full attention!

Use this guide to help you give your new starter the best start possible, ensuring they:

- settle in;
- have access to everything they need;
- can contribute to your team as quickly as possible.

The induction pathway in this booklet is set out in six time periods and provides links to relevant resources.

Use it alongside the latest available version of the Managers Induction Checklist.



# Your responsibilities

As a line manager you are responsible for ensuring that your staff and volunteers receive a well-organised and consistent induction. This will require planning, time and resources.

Key things that you need to do are:

> Complete necessary forms and tasks before your new starter begins

> Implement the induction plan

> Make your new starter feel welcomed and supported

> Make time for your new starter

> Review their progress regularly

> Set targets or objectives over the first month

Although you may delegate parts of the induction to the relevant subject matter experts, you are accountable for the overall process.

# Getting started

Once you have made the verbal offer to your chosen candidate, please:

- Complete the ‘create placement’ form on Eploy
- Update the status of any other candidate(s) who may have been interviewed – you can find these on your hiring manager dashboard

The Onboarding team will then carry out all pre-employment checks including references and criminal record check if applicable.

Once you have their ID number from People Support, you can begin preparing for the arrival for your new starter.

- IT new user account form

*(This can take up to two weeks for access to be integrated across all systems)*

- IT equipment order form
- ID card
- Managing Drivers Handbook

*(If your new starter is driving on Red Cross business)*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# Statistics

**20%**

Increase in manager satisfaction when employees do formal onboarding

**50%**

**Greater new hire retention**

**for organisations with a standard onboarding experience**

**33%**

Of new hires look for a new job within their first six months

**8 months**

**for a newly hired employee to reach full productivity**

**Up to**

**20%**

**of employee turnover happens in the first 45 days**

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*Source: https://www.clickboarding.com/18-jaw-dropping-onboarding-stats-you-need-to-know/*

# Pre-Arrival

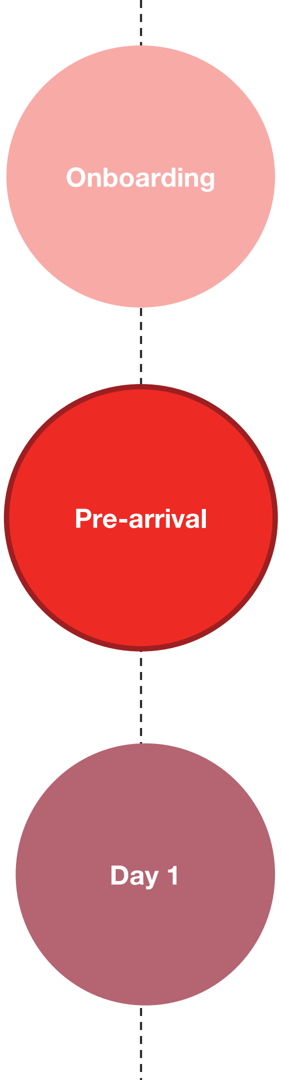
- Identify needs
- Order systems
- Consider adjustments
- Initial learning & development
- Process requests
- New starter forms

# Pre-arrival

<u>Before your new starter's first day:</u>

- ✓ Keep communication lines open
- ✓ Check in every week or two with a phone call or email to see if they have any questions/concerns
- ✓ This personal attention will communicate the kind of leader you are going to be when they arrive
- ✓ Use the Induction - Manager Checklist to plan their arrival

**Pre-arrival Checklist** (pg2)

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# Did you know?

Losing a new member of staff and having to replace them costs about 25% of their salary/wage

# Day 1

| Identify needs | Make introductions | Orientation (tour) | Orientation (organisation) | Orientation (role) | Probationary forms |
|---|---|---|---|---|---|

# Day 1

Checklists are helpful but don't let the induction become a tick-box exercise. Both you and your new starter should take responsibility for making sure that all items are thoroughly covered.

If you are not based in the same location as your new starter, ensure a colleague is available to meet them and that you have time booked in to speak to them early in the day.

**Day 1 Checklist** (pg3)

**New Staff Manager Checklist*** (pg9)

**New Vol Manager Checklist*** (pg10)

*Only needed if your new recruit is a manager*

# Back to basics

Induction isn't just skills training. It's about the basics that people already in the organisation know.

Don't forget to talk to your new starter about the things that are specific to their role:

- Working hours
- Process for lunches/breaks
- What systems they should have access to
- Sickness, absence and holiday procedures
- Ways of working (i.e. Zap Zoom, expenses)

The Day 1 checklist will help with this.

If your new starter is working remotely they may need to know how to set themselves up and access systems from home.

If your new starter is office-based don't forget to also cover:

- Where to get tea/coffee or put their lunch
- When the fire alarm test occurs
- First aid and assembly points
- Toilet location
- Where to send/receive post
- Where to get stationery from
- How to book travel
- How to book a room
- How to create an email signature
- How to connect to the printer
- Use of personal smart phones, and internet browsing policies
- How to setup/login remotely

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# Local induction

Whilst your new starter gets to know all about the British Red Cross and the wider Red Cross movement; you should also be implementing their service or directorate induction.

This introduces the role, team, environment and equipment; and should be the bulk of the new starters' induction. Many services or directorates already have packs to support with this, so if you don't know where to find this, please ask your line manager.

Things that may be covered as part of this part of the induction include:

- Schedules, rotas and work patterns
- Uniform or vehicle (if appropriate)
- Local building layout, facilities, policies (i.e. clear desk) and access codes
- Specific health and safety requirements (i.e. infection control, safer handling, driving safely)
- Role relevant training (i.e. tills, safeguarding, First Aid etc.)
- Information specific to your service or directorate (i.e. structure, SMT, organogram, strategy)
- Information specific to your team (i.e. projects, processes, communication methods, templates)
- Relevant systems and processes (i.e. PIMS for International, Ascent for Fundraising, etc.)

# Did you know?

69% of employees are more likely to stay with a company for three years if they experienced great onboarding

# Week 1

| Identify needs | Make introductions | Orientation (tour) | Orientation (organisation) | Orientation (role) | Probationary forms |
|---|---|---|---|---|---|

# Week 1

Start with the basics, but don't cram everything in. People become productive sooner if they understand the fundamentals of their jobs first.

Focus on the why, when, where, and how before you hand over any assignments or projects.

**Week 1 Checklist** (pg4 and 10*)

**Mandatory Training Suite**

**Probation Procedure**

**Only needed if your new recruit is a manager*

# Hints and tips

| What to avoid | What to do instead |
| --- | --- |
| Giving a new starter too much new information, paperwork and people to meet | Work out what is essential for Day 1 and spread the rest out across the induction |
| Leaving a new starter to have a break or extended periods of time with nothing to do | Ensure colleagues are available at breaks and plan any downtime (i.e. when you are in a meeting) to be productive for the new starter (i.e. exploring RedRoom, doing e-learning) |
| Asking the new starter to begin the job straight away without the confidence and understanding an induction will give them | Gradually introduce the job, making time for the new starter to try tasks in a supportive environment |
| Delaying the induction, even for a few days<br>• New starters may pick up mis-information if they are not given an induction from Day 1 | See if any of your less time-sensitive tasks can be moved around. Or, see if Day 1's start and finish times can be adjusted to ensure your availability |
| Skipping any type of induction altogether | Whilst it is important to begin the induction promptly, it can then be split into manageable portions |
| Seeing induction as time consuming and not necessary | Use positive language and give value to the time required to settle in and engage with the training |

# E-learning

There are certain things that everyone who joins the British Red Cross needs to know. This has been pulled together in the Mandatory training e-learning and the Welcome to the British Red Cross e-learning.

There is a wealth of information available online which we recommend that your new starter look at, but the induction e-learning modules are mandatory for all new starters. The e-learning will take about 3-4 hours to complete, but your new starter can do this in bite sized pieces! Remember to build in enough time in their induction plan for them to do this.

There will be different timelines for staff and volunteers to complete these modules. Staff are expected to complete these within their first month in the organisation, whereas volunteers* are usually expected to complete these before they start volunteering in their role.

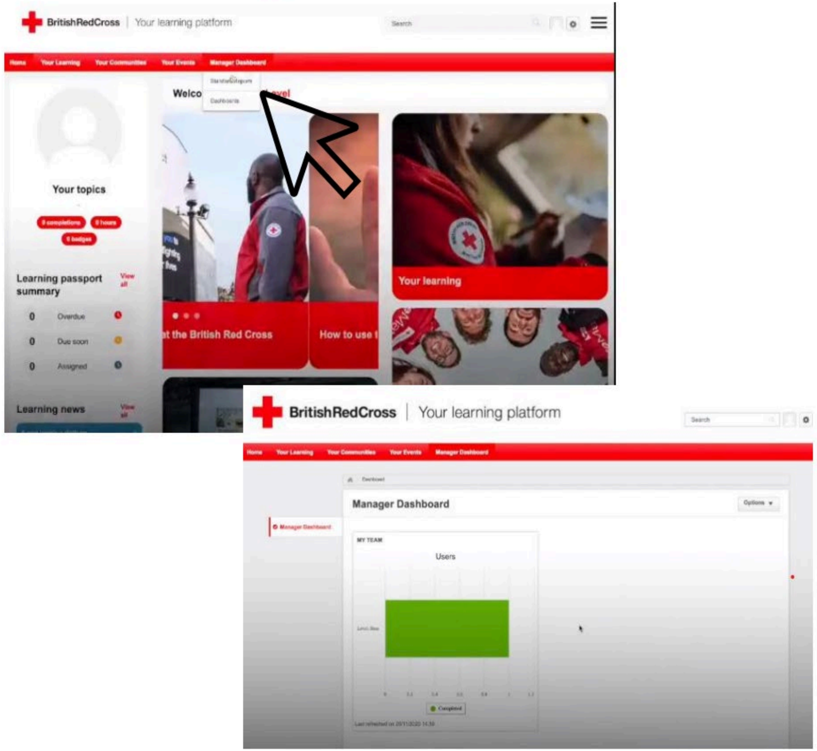
| | |
|---|---|
| **Week 1** | Complete Mandatory training e-learning via the Learning Platform |
| **Month 1** | Complete Welcome to the British Red Cross e-learning |
| **Month 1-2** | Sign up to and attend the Welcome Day Zoom workshop<br>(or the Red Cross Training and Retail equivalencies) |

# Check your new starter’s progress

If you new starter* is undertaking their e-learning through the Learning Platform you can check on how they are doing through the reporting function.

You can do this by:

- Logging into the platform
- Selecting Manager Dashboard from the menu bar
- You will see an overview of training completions for your team
- More support can be found in these videos:
  - Manager view of training records
  - Manager dashboards




*Currently volunteer managers cannot see this information in the Learning Platform. This data however can be found in Assemble for volunteers who are within the system.*

# Month 1

| | | | | | |
|---|---|---|---|---|---|
| Attending Welcome Day | Reviewing & applying needs | Identifying priorities | Identifying support | Probationary review | Benefits forms |

# Month 1

The induction process doesn't simply end after the new starter's first day, week or even month. It's your responsibility as a manager to continue to engage new recruits.

During the first month, the focus should be to help the new starter gain a reasonable grasp of the organisation and their role.

Alongside the British Red Cross induction, you should be working through your service or directorate specific induction too.

**Month 1 Checklist** (pg5&6)

**New Manager Checklist*** (pg9&10)

**Only needed if your new recruit is a manager*

# Did you know?

The Human Capital Institute states that 70% of new recruits decide to stay with, or leave, an organisation in the first 6 months.

When you successfully engage new recruits and maintain engagement in their early months (as well as throughout their career), you will lower turnover and its associated costs, whilst developing a workforce that's committed and motivated.

# Month 3

Review progress

Discuss performance

Identify development needs and review support

Aligning with ‘Big Picture’

Probationary forms

# Month 3

<u>This is a crucial milestone as it's time for the interim probation review</u>

This is an opportunity to take stock of how your new starter has been developing and celebrate the successes they have so far achieved in their role!

This is also the time to look at where they can continue to develop and what support you need to provide for them to do so.

**Month 3 Checklist** (pg7)

**New Manager Checklist*** (pg9&10)

**Interim Probation Review**

*Only needed if your new recruit is a manager*

# Did you know?

New starters who went through a structured onboarding program were 58% more likely to be with the organisation after three years

# Month 6

Check progress | Review performance | Gather induction feedback | Discuss aspirations | Probationary forms

# Month 6

**<u>It's time for the end of probation review</u>**

A successful induction is inspiring, organised and fit for purpose. You can tell how effective it is by how well a person adjusts to the organisation.

The next stage is to work out how the person can be further developed. Remember it is the brightest talent who are most likely and able to leave – so continue to keep them challenged and engaged.

**Month 6 Checklist** (pg8)

**End of Probation Review**

# Important procedures and forms

Create Placement form - The 'Create Placement' form on ePloy should be used to notify the resourcing team when a candidate has been successful at interview and has been verbally offered a position. The information included in this form will allow the Onboarding team your team to generate an offer to your successful candidate.

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New IT user request form - This form is essential to creating a British Red Cross IT user account for a new member of staff. It covers setting up a user account, e-mail address and access to shared drives when they join so that they can begin their induction with minimal delay. This process can take up to 2 weeks. You will need your recruits ID number from People Support.

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Reasonable adjustment procedures and guidance - This procedure provides an agreed structure to formally consider and review requests for reasonable adjustments for our staff.

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Mobile phone procedure and request form - This form allows you to request a mobile phone for your new starter. You need to get the individual to fill and sign the agreement form, get it approved accordingly and then send it to Shared Service Centre (SSC). For the International Directorate, this needs to be sent to the IT Service Desk.

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Probation and review policy and procedure - The British Red Cross operates probationary periods of six months for all new employees. It is intended as an opportunity for both the employee and line manager to assess the fit between the employee, their role and the organisation. The probation and review record form is to be used in collaboration with the new starter during the whole probation period. At the end of probation, this needs to be signed and sent to People Support.

# Useful links

Anti-Racism Programme - Find out about our vision and objectives, tools, resources, support and how you can get involved.

Brand hub - All the information you need to know about the British Red Cross brand; including information about the vision, mission and promise, brand guidelines, templates and the brand toolkit.

Benefits - For permanent staff members the British Red Cross offer a wide range of staff benefits. Visit our benefits portal to find out more.

Datix - Datix is our online incident reporting system. All staff and volunteers should use this to log any incident, accident or near miss onto the system to help manage risk across the organisation.

Diversity and accessibility resources - Find all your diversity and inclusion support needs; such as impact assessments, advice and support, and reasonable adjustment procedures

Diversity Networks - Join one of our four networks: Black, Asian and minority ethic (BAME); Disability; Lesbian, Gay, Bisexual, Trans and other sexual orientation and gender minorities (LGBT+); Gender equality.

Employee handbook - This includes information of the terms, conditions and guidelines for working within the Red Cross.

# Useful links

Human Resources quick links - The People Advice & Casework team provide support to managers, staff and volunteers with any concerns that they have from an employee relations or volunteer engagement perspective. Examples of this can include Disciplinary, Grievance, Volunteer Complaints, Issues and Concerns (CIC) procedures, Performance, Absence Management, Flexible Working etc. You can find contact details of the Adviser or Assistant aligned to your Directorate on the RedRoom page, calling 0141 847 5330 (internal 13440) or emailing peoplesupport@redcross.org.uk.

Policies and procedures - In these pages you will find all our corporate policies and procedures.

Pension - Find out more about our pension scheme, the Orbit system and how you can manage your own pension arrangements.

Travel and expenses - Our policy, principles and rules relating to travel and expenses.

Workplaces for the Future - Learn about our hybrid way of working at British Red Cross.

Wellbeing - Your health and wellbeing are a priority at British Red Cross, and we have a wide range of resources to support you. Search ‘wellbeing’ on RedRoom to find out what’s available.

Volunteer management – Learn about the organisation’s vision and commitment to involving volunteers in our work, as well as the accompanying policies and procedures that are relevant to volunteers and working with volunteers.

# Learning and Development links

Coaching and mentoring – There are a range of opportunities available across the organisation around coaching and mentoring, including a career development mentoring scheme, upskilling sessions on being a coach and coaching surgeries which provide real-time support and space to discuss a specific challenge or goal.

Learning and development offer pack - Discover the latest learning and development opportunities available to all our people through our regularly updated offer pack.

Learning opportunities for managers - British Red Cross offer a range of learning to support you as a manager, to develop yourself and your people. You can find a wide range of bite size digital learning and facilitated sessions for you to tap into as and when you need them.

Personal development - In order to build a stronger, successful and more resilient Red Cross, and to remain an attractive employer, we are committed to encouraging and supporting the development of staff. You can find out more about career development opportunities on the RedRoom page or contacting mylearning@redcross.org.uk.

Teams and Leadership portal - Teams & Leadership is an online platform that helps teams work better together, and leaders to improve. As a manager use the Reviews and Expert Guidance to discover what's working for you or your team, what's not, and what to do about it. You can also set up team reviews and individual 360 assessments.

# Helpful contacts

| Contacts | Responsibilities |
|---|---|
| Diversity Team<br>Diversity<br>@redcross.org.uk | The Diversity team undertake activities to support equality, diversity and inclusion implementation. You can contact the team for support and advice in regards to accessibility, reasonable adjustments and implementing diversity. |
| Employee Assistance<br>www.healthassured<br>eap.com | Our staff and volunteer support service is available online, by phone and face-to-face. Online: Username/password BRC. 24 hours a day 365 days a year<br>UK: 0800 030 5182<br>Overseas: +44(0)161 836 94008 |
| Facilities Management | Kier Services provides facilities management services across the majority of British Red Cross shops and offices. Visit RedRoom to find out if Kier can help with your building issue. You can call them on 0345 054 7311; (Option 1)<br>If you are based in UKO (44 Moorfields, London); there is a separate Facilities team that manage the building. Contact them at ukofacilities@redcross.org.uk |
| Learning & Organisation Development<br>Mylearning<br>@redcross.org.uk | The Learning and Development team facilitate learning across the organisation, supporting and growing a quality and diverse learning culture, and provide advice on learning and career development opportunities. They also fund participation in relevant external courses and studies upon application. You can contact the team by email or calling 02078 777525. |

# Helpful contacts

| Contacts | Responsibilities |
|---|---|
| People Advice & Casework | The Advice & Casework team provide support to managers, staff and volunteers with any concerns that they have from an employee relations or volunteer engagement perspective. Examples of this include Disciplinary, Grievance, CIC's, Performance, Absence Management, Flexible Working etc. You can find contact details of the Adviser or Assistant aligned to your Directorate on the RedRoom page. |
| People Support<br>peoplesupport@redcross.org.uk | People Support provide first line support, guidance and signposting to staff, volunteers, managers and candidates. The team are responsible for all administration in relation to staff onboarding, lifecycle changes and DBS re-checking.<br>UK: 0141 847 5330<br>Internal: 13440 |
| Shared Service Centre (SSC)<br>SSC@redcross.org.uk | The Shared Service Centre support desk can provide guidance on systems, property, payroll, travel, expenses, purchasing, fleet and procurement.<br>UK: 0345 054 7311 |

# Helpful contacts

| Contacts | Responsibilities |
|---|---|
| Safeguarding Assurance Team safeguarding@redcross.org.uk | We have team of specialist Safeguarding Assurance Advisers available to support all directorates, services, staff and volunteers with any safeguarding concern. |
| Staff Association peopleexpertservices@redcross.org.uk | The staff association is a joint committee of British Red Cross employees and leadership who come together to discuss issues and changes to the organisation and its affect on staff. You can raise issues about your experiences with your staff representative – details of which can be found here. |
| Raising a Concern | If you have a concern about any issue relating to your work or workplace, you should raise it with your manager. If you don't feel comfortable doing this, then please refer to the Raising a Concern Procedure or contact the P&L Advice and Support Team on PeopleSupport@redcross.org.uk or 0141 847 5330. |
| Volunteer Representation representation@redcross.org.uk | Volunteer representatives will take volunteers' perspectives to senior management so to inform, influence and improve service delivery. |

# Systems we use

Introductory e-learning tutorials on using our online systems

**Agresso** is the system we use for organising financial information and reporting. You are required to complete online training or Zoom sessions before certain access is granted to the system. It is in Agresso that you claim for expenses.

**Ascent** is a system used by predominantly by the Fundraising Directorate for the contact and financial management of supporters.

**Assemble** is our volunteer website, primarily used by volunteers and volunteer line managers for things such as updating contact details, viewing training records, recruiting volunteers and keeping in touch.

**Citrix** is a 'virtual desktop' that allows you to access your computer desktop from any device connected to internet.

**Datix** is used for managing incidents. It allows you to see reports and investigate incidents.

**E-ploy** is an Applicant Tracking System that allows you to recruit in one place, from raising a recruitment request to shortlisting candidates. Contact recruitment@redcross.org.uk with any questions.

**The Learning Platform** is where you can complete your mandatory training and find learning to support you in your role at the British Red Cross.

**Microsoft Teams** is the tool we use for collaboration. It can be used for group chat, filing, sharing and editing documentation in real time, asking quick questions to colleagues, running online meetings and much more.

# Systems we use

Introductory e-learning tutorials on using our online systems

OneLogin allows you to access different Red Cross systems. This includes Outlook, RedRoom, SAVi, Office 365, Learning Platform, the brand toolkit and the iCentral booking portal.

Outlook is the organisation's email system. Your account allows you to organise your emails, calendars, contacts, tasks and to-do lists.

PIMS is the system used by the International Directorate to share and store documents and support key business processes including project and grant management, corporate reporting and desk booking.

RedRoom is the British Red Cross intranet. It is the place to find news, staff and volunteers' information, training material, and other resources.

SAVi is our HR and Payroll system which holds all your personal data, including training records. The Self Service system allows you to update your details, book annual leave and find training courses.
If you are a line manager you can access information on your team members using the People Manager module.

ShoreTel is our telephony system, installed in most British Red Cross offices.

MySupport is a portal used to log non-urgent issues and requests with IT and SSC, as well as tracking/updating existing records and getting updates on key systems.

Zoom is how we make video calls. You can host calls, or join meetings from any device and any location.

# Valuing our people

As your new starter progresses through the organisation, you can also look at our awards schemes as a way to show value.

- **Values in Action Awards** – a fantastic way to recognise the great things colleagues are doing across the organisation to bring our four values to life in their work. Two levels of awards, Significant is recognised by a certificate, Exceptional is recognised by a certificate and badge.

- **Young Humanitarian Award** – created for people under the age of 26 who have demonstrated one or more of the British Red Cross values; showed exceptional leadership skills and/or made a major impact over a short or sustained period of time

- **Long Service Awards** at five, 10, 20, 30 and 40 years, at which point a lifetime achievement award will be given, this happens automatically.

- You may also want to nominate someone for the Queen's Badge of Honour or a UK Honour such as an OBE or MBE.
- Value cards/Value e-cards – informal recognition tools
- Thank you and kindness certificates – informal recognition tools
- Further information can be found on RedRoom